

Reclassification

Project Plan Development and Maintenance

Develop Timelines
Track Project Phases
Update or amend as necessary

Project Scope

Provide precise description of tech.
Develop lines of distinction with other tech.
Must reflect documents either provided by the Government or identified by contractor

Initial Classification Schedule(s)/Classification Definition Dev.

Create tentative classification schedule using statement of scope and/or documents

Schedule Testing

Test the new schedule by assigning the new classifications to a selected group of patents
Test hierarchical problems and other flaws
Adjust schedule and definitions as appropriate

Project Documentation Development (i.e. Draft classification Order)

Create a draft classification order by using new schedule, definitions and all reference docs
Order includes info. necessary to incorporate new schedule(s) into USPC and update USPC-IPC concordance,
Index to USPC, references to related def. in other classes and other class. systems

Document Classification

Assign final classification to each and every document in the project

Project Plan Development and Maintenance

Government Actions

- Will provide initial Proposal of Project Scope
- TOPS template (see attachment)
- Review of deliverable, identify problems and return for amendments

Contractor Actions

- Project plan in MS Word, using the TOPS template, containing
 - Timelines for completion of project including:
 - finalizing the project scope
 - developing a proposed classification schedule
 - testing of the schedule(s)
 - reporting of the results
 - delivering the completed Draft Classification Order
 - reclassifying the documents in the project
 - Project milestones with specific time intervals between working phases
- Status Meetings

Note: This task should take a nominal amount of time to complete.

Project Scope

Government Actions

- Will provide initial Project Scope (may be term, brief description of tech area, list of documents, etc.)
- Review deliverables, identify problems, and return for corrections.
- Provide continuous feedback and direction at status meetings.

Contractor Actions

- Provide relevant existing US or IPC classification and related documents for inclusion into the project.
- Deliver Project Scope recommendation with:
 - Precise statement of the technology covered
 - All relevant US and IPC Classifications
 - Boundaries with related areas
 - Supporting documentation (e.g., query statements).
- Status Meetings

Initial Classification Schedules and Classification Definition Development

Government Actions

- Will provide key elements to assist in creation of initial classification schedule and classification def.
- Review of deliverable identify problems and return for correction.

Contractor Actions

- Consult with Gov. personnel and receive input
- Research and Evaluate existing EPO and JPO schedules
- Provide proposed schedule and definitions in MS Word
- Provide Rough Sort of documents
- Status Meetings

Schedule Testing

Government Actions

- Issue task order containing:
 - A) a classification schedule(s) with working numbers and draft classification definitions for that schedule.
 - B) a list of US patent document identifiers (document numbers) that constitute a representative sample of the patent documents in the project that are to be classified into the schedule(s)

Contractor Actions

- Test new classification schedule(s) and definitions by classifying the patent documents with either the Primary or OR classification
- Inform Gov't of any problems
- Provide Report (see CLIN 4)
- For international projects compare data
- Adjust schedule and definitions as appropriate
- Status Meetings

Project Documentation Development

Government Actions

- Will provide final draft of new classification schedule(s) and definitions, a list of documents previously classified into the new schedule(s), translation table listing the working numbers and the corresponding final subclass numbers, and information on external search notes, and references.
- Will make available MS Word template containing the formats to be followed to prepare a Draft Classification Order.
- The Government will review the proposed order and accept or reject within 45 days of receipt.

Contractor Actions

- Electronically submit completed Draft Classification Order by the time specified in the task order.

As the order is prepared for publication, answer questions and resolve problems identified.

- Status Meetings

Document Classification

Government Actions

- Provide final classification schedule(s) with working numbers and definitions, a list of patent documents to be classified in the final schedule(s), and the required format for data returned to the Government.
- Provide newly published patent documents on weekly basis.

Contractor Actions

- Assign all required working and/or final numbers and provide the appropriate information, identified in ANNEX1.
- During the 6 months following completion of the project, assign new classifications to the newly published documents within 1 week of receiving the list.
- Prepare separate list of documents on the complete project list having no claimed disclosure within the technical scope of the project
- Status Meetings